



EMPLOYEE SELF-SERVICE GUIDE

Sample Employee Open Enrollment Communication and
Instruction



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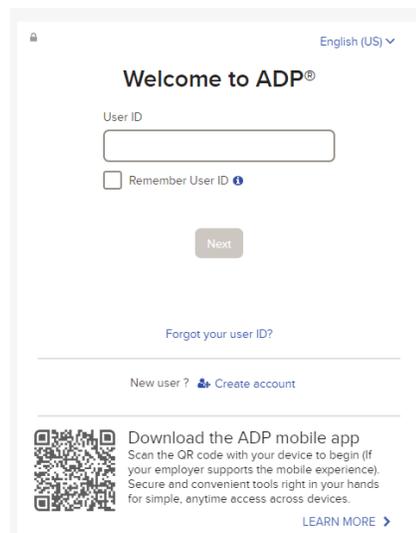


Dear Employee,

We are excited to announce the start of Open Enrollment on the *Employee Self Service** website.

This letter explains what you need to do to complete your enrollments. The Open Enrollment period will last <<**ENTER DURATION**>>, starting <<**ENTER DATE**>> and ending <<**ENTER DATE**>>. All changes to your benefits must be completed by <<**ENTER TIME and DATE**>>. The changes that you make to your benefits will take effect on <<**ENTER BENEFIT EFFECTIVE DATE****>>.

Log in to Workforce Now to access the Employee Self-Service* website.
<https://workforcenow.adp.com>

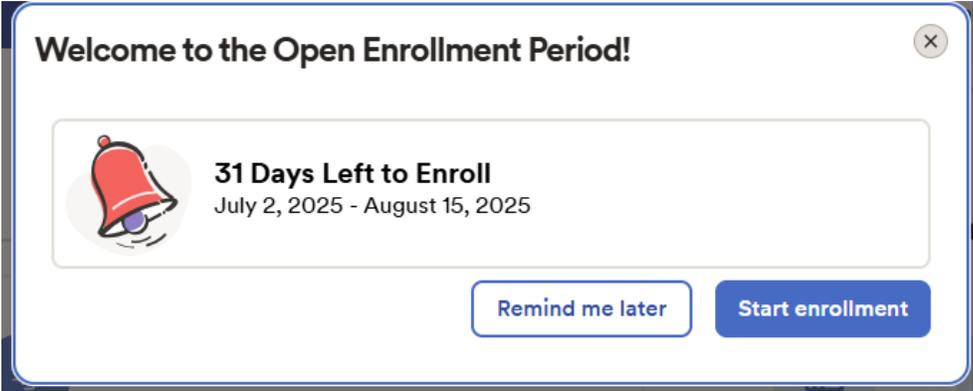


Enter your User ID and password, and then click **Sign In**.

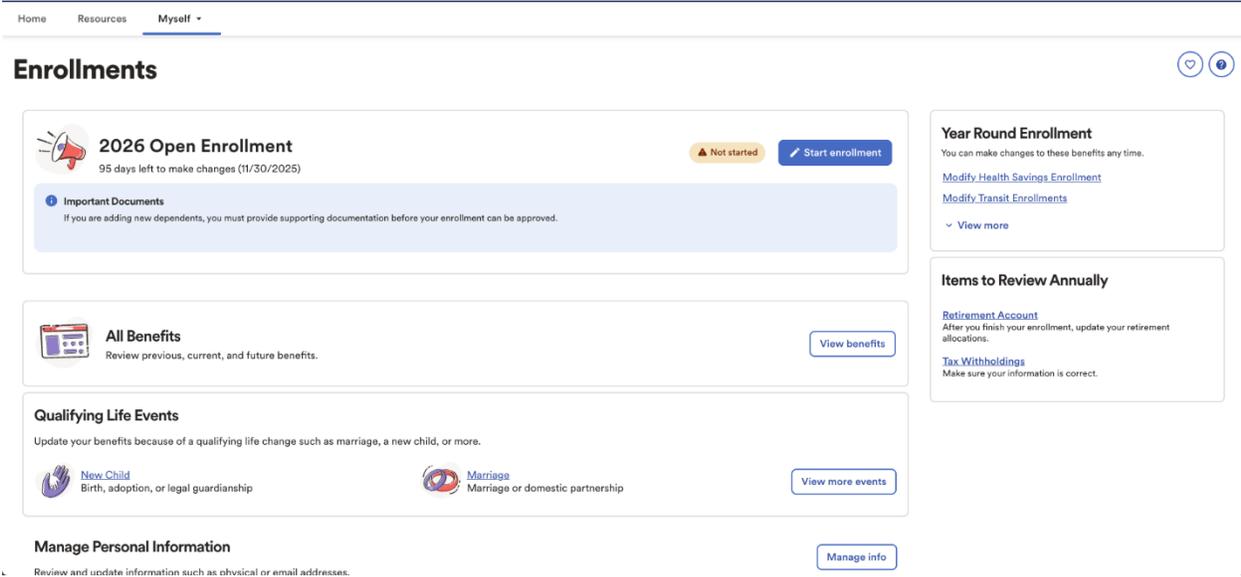
Note: If this is your first time logging in, click **Create account**. If you are unsure of the registration code, please contact your HR team.

Upon logging in, you will be presented with a pop-up showing important information about this Open Enrollment period. You can click **Start Enrollment** or **Remind Me Later**.

Note: This pop-up is displayed each time you log in during the Open Enrollment period. 24-hours after submitting your selections the pop-up will no longer display.



Select **Start enrollment** will bring you to the Myself – Benefits – Enrollments screen where you can click **Start Enrollment**.



You will be taken to the **Welcome Note**. Please review all the information on this page, as there are often important details regarding your Open Enrollment options. Click **Next** after reviewing the Welcome Note to move to **Manage Dependents and Beneficiaries**.

Open Enrollment



- Welcome
- Manage Dependents and Beneficiaries
- Review Surveys
- Enroll in Benefits
- Update Beneficiary Percentages
- Upload Documents
- Review and Confirm

Welcome, Kate! Open Enrollment has started.

During this enrollment period, you can do the following:

- Make changes to plan contributions, such as health savings account (HSA) or retirement plans
- Add or change the level of your insurance coverage
- Add or update Beneficiary assignments

Carefully review your options and costs. After the enrollment period ends, your choices are final until the next enrollment period or until you have a qualifying life event. Contact your Human Resources department with questions.

Finish later [Next →](#)

The **Manage Dependents and Beneficiaries** page is where you can add, view and edit your dependent and beneficiaries.

Select **“Add”** to add a new dependent/beneficiary.

Open Enrollment



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Manage Dependents and Beneficiaries

Make sure you add everyone you want covered, then you can enroll them on the Enroll in Benefits step.

Important Documents

Please note we require marriage certificates and/or birth certificates at the time of adding new dependents for insurance coverage.

Please upload the required documents if you have added a new dependent to your insurance coverage.

Add Dependents and Beneficiaries

People eligible for coverage from your benefits and people or organizations who you want to receive your benefits (usually financial) after you die.

[Add](#)

A **Survey** screen will prompt **only** if applicable based on the settings within the enrollment event itself. If any tobacco attestation is required, you must acknowledge the attestation (“I agree that all the information provided about my tobacco usage is true and correct”) in order for **Next** to be available and allow you to continue to **Enroll in Benefits** page.

Open Enrollment



Open Enrollment navigation menu:

- Welcome
- Manage Dependents and Beneficiaries
- Review Surveys
- Tobacco Usage**
- Enroll in Benefits
- Update Beneficiary Percentages
- Upload Documents
- Review and Confirm

Tobacco Usage

Are you a tobacco user?*

No

Yes

I agree that the information provided about my tobacco usage is true and correct.

Buttons: Finish later, < Back, Next >

Note: If you are age 55 and over you will be prompted for a survey to certify if you are enrolled in Medicare. If you are enrolled in Medicare, you will no longer be eligible to contribute to a Health Savings Account.

Enroll in Benefits step is presented in sub steps of Health Insurance, Spending Accounts, Life and Other Supplemental Insurance, and Additional Benefits.

- Health Insurance includes plan types Medical, Dental, Vision, Prescription
- Spending Accounts include plan types of HSA, FSA Health, FSA Dependent, HRA, MSA, Spending (Other)
- Life and Other Supplemental Insurance include plan types of Life, AD&D, LTD, STD, Critical Illness, Hospital, Accident, Cancer
- Additional Benefits include plan types Parking, Transit, Van Pool, Retirement, Custom

Open Enrollment

- Welcome
- Manage Dependents and Beneficiaries
- Enroll in Benefits**
- Health Insurance**
- Spending Accounts
- Life and Other Supplemental Insurance
- Additional Benefits
- Review and Confirm

Health Insurance

Review and edit your benefit options. Make sure you add or remove dependents as needed.

Your Cost Per Paycheck

Current Cost: \$0.00 New Cost: \$0.00

📅 Benefits changes will start on 01/01/2026



Medical

No Coverage ⚠️ Action required

Your available benefit option is RC - PPO Medical. See if it's right for you.

⚠️ You need to enroll in a plan or waive this benefit.

Enroll

Waive

- Welcome
- Manage Dependents and Beneficiaries
- Enroll in Benefits
- Health Insurance
- Spending Accounts**
- Life and Other Supplemental Insurance
- Additional Benefits
- Review and Confirm

Spending Accounts

Now is the perfect time to update your savings accounts and take advantage of pretax savings.

Your Cost Per Paycheck

Current Cost: \$0.00 New Cost: \$0.00

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FSA Health Care

No Coverage Current

Your available benefit option is FSA Health Care. See if it's right for you.

Enroll

- Welcome
- Manage Dependents and Beneficiaries
- Enroll in Benefits
- Health Insurance
- Spending Accounts
- Life and Other Supplemental Insurance**
- Additional Benefits
- Review and Confirm

Life and Other Supplemental Insurance

Explore your eligible insurance options and update your current benefits.

Your Cost Per Paycheck

Current Cost: \$0.00 New Cost: \$0.00

📅 Benefits changes will start on 01/01/2026



Employee Life

No Coverage Current

Your available benefit option is Voluntary Employee Life. See if it's right for you.

Enroll

Welcome

Manage Dependents and Beneficiaries

Enroll in Benefits

- Health Insurance
- Spending Accounts
- Life and Other Supplemental Insurance
- Additional Benefits**

Review and Confirm

Additional Benefits

To maximize your coverage, view additional benefits you may be eligible to enroll in.

Your Cost Per Paycheck Current Cost: \$0.00 New Cost: \$0.00

📅 Benefits changes will start on 01/01/2026

 **Transit**

No Coverage Current Enroll

Your available benefit option is Commuter- Transit, Transit. See if it's right for you.

 **Parking**

No Coverage Current Enroll

Your available benefit option is Commuter- Parking, Parking. See if it's right for you.

Waive should only display for benefit plan types that require a waive reason. Employees should only select **Waive** if you do not want to continue enrollment in a benefit or are not enrolled currently and a waive reason is required. If you choose to **waive** a benefit, you will be required to select a **Waive Reason**.

 **Medical**

No Coverage ⚠️ Action required

Your available benefit option is RC - PPO Medical. See if it's right for you.

⚠️ You need to enroll in a plan or waive this benefit. Enroll Waive

Welcome

Manage Dependents and Beneficiaries

Health Insurance

Review and edit your benefit options. Make sure you add or remove dependents as needed.

Enroll in Benefits

- Health Insurance**
- Spending Accounts
- Life and Other Supplemental Insurance
- Additional Benefits
- Review and Confirm

Waive Benefit ✕

Are you sure you want to waive Medical benefit?

⚠️ Waiving this benefit means you do not require coverage. You can still enroll in the plan while the enrollment period is open.

Waive Reason

Select a reason

No, cancel
Yes, waive benefit

While enrolling in a plan, please be sure to indicate which dependents should be covered in the **Covered Individuals** section, if applicable. Then proceed with your enrollment.

Available Plans

Medical

Select the plan that meets your needs and add the dependents you want to cover.

Covered Individuals

Kate Sanchez (You) Audrey Sanchez (Child)

1 Plan Available [Plan comparison](#)

RC - PPO Medical
(2 individuals selected) [Additional details](#)

Provider	Employer Cost	Your Cost
ADP Services	\$124.62	\$73.85

⚠️ Confirm the details for this plan selection or waive this benefit. [Confirm details](#)

[Waive benefit](#) [Cancel](#)

Note: The coverage level for your enrollment (Employee Only, Employee + Spouse, Employee + Child(ren), Employee + Family) is driven by which dependents you enroll. When you choose to enroll in a plan, it will display the **Per Paycheck** cost for the employee and employer.

RC PPO, Medical PPO
(1 individual selected)

Provider	Employer cost per paycheck	Your cost per paycheck
Aetna Inc.	\$60.00	\$57.00

⚠️ Confirm the details for this plan selection or waive this benefit. [Confirm details](#)

Confirm details may include some additional information needed (i.e. PCP-ID).

Confirm Details



ADP Services: RC - PPO Medical

Covered Individual

You

Primary Care Physician Details

Kate Sanchez

Enter Primary Care Physician Details

First Name

Last Name

ID Number

Per Paycheck Costs

Total Cost Per Paycheck

\$57.69

Back

Confirm

Review your enrollment, costs, and covered individuals carefully before clicking on **Confirm**.

Once confirmed, you will receive a confirmation message that you are now enrolled.

Welcome

Manage Dependents and Beneficiaries

Review Surveys

Enroll in Benefits

Health Insurance

Health Insurance

Review and edit your benefit options. Make sure you add or remove dependents as needed.

✔ You enrolled in RC - PPO Medical.

Your Cost Per Paycheck

Current Cost: \$3.94 New Cost: \$61.63 ↑ \$57.69

📅 Benefits changes will start on 01/01/2026

Voluntary Life Elections and Beneficiaries:

When you elect Voluntary Life, you will also need to designate your beneficiaries. Start by clicking **Enroll** and then choose the amount of coverage you want to elect from the drop down.

1 Plan Available

RC Employee Voluntary Life
(1 individual selected)

Provider
Metropolitan Life Insurance Company (MetLife)

Select Coverage Amount

Additional Coverage Total Actual Coverage Amount

\$170,000.00

\$170,000.00

⚠ Evidence of Insurability (EOI) is required by insurance carriers to assess overall health for this insurance coverage. EOI may include answering a medical questionnaire, providing health history, and completing a physical exam through the insurance carrier.

⚠ **Over The Limit - Approval Required**
The Total Actual Coverage Amount is over the guarantee issue amount of \$100,000.00. That amount requires Evidence of Insurability (EOI) and approval from the insurance carrier.

If the amount selected is over the Guarantee Issue amount, additional approval will be required, and you will be asked to complete **Evidence of Insurability (EOI)** and submit it to your employer. Your full election amount will not be approved until this process is completed.

Next you will want to enter your beneficiary designation. Including **Primary** and **Secondary**, if applicable. All beneficiary delegation percentages combined must equal 100% for each category (Primary or Secondary).

Beneficiaries [Add Beneficiary](#)

Allocate the percentages of your benefits payout. You can divide the percent paid to as many beneficiaries as you want, but the total must equal 100%.

Beneficiary	Primary	Secondary
Audrey Sanchez Child	100 %	0 %
Conor Sanchez Child	0 %	100 %
Total	100.00%	100.00%

⚠ Confirm the details for this plan selection. [Confirm details](#)

Click **Confirm details**.

Note: During enrollment you may need to take actions if the plans are set to **require** a beneficiary designation.

Available Plans

At least one primary beneficiary must be designated.

Voluntary Employee Life

Select the plan that meets your needs.



Employee Life

ADP Services: Company Paid Life Action required

Effective Date: July 1, 2025

You need to add a beneficiary assignment. Edit

Employee Coverage
\$50,000.00

Current Cost
\$0.15
[Cost details](#)

Review coverage and beneficiary designations and **Confirm**.

Confirm Details

Metropolitan Life Insurance Company (MetLife): Voluntary Employee Life

Covered Individual
You

Coverage
Total Actual Coverage Amount
\$100,000.00

Beneficiaries
Audrey Sanchez (Child) Primary (100.00%)

Per Paycheck Costs

Employer Cost	Your Cost
\$0.00	\$14.77

Back Confirm

Update Beneficiary Percentages step includes all plan types where beneficiary designations can be provided. Allowing employees to view and edit assigned beneficiaries in one place.

	Primary	Secondary
Audrey Sanchez Child	100 %	0%
Conor Sanchez Child	0%	100 %
Total	100%	100%

Continue through each sub step completing all your benefit enrollment elections.

Upload Documents will only be displayed if your Practitioner is requesting documents to be uploaded and returned during your enrollment elections.

Select and review required documents to upload. File must be less than 5MB. Accepted formats

Important Documents
Please note we require marriage certificates and/or birth certificates at the time of adding new dependents for insurance coverage.
Please upload the required documents if you have added a new dependent to your insurance coverage.

Select file to upload

Review and Confirm

Review all your selections/changes. When you have confirmed them, click **Submit enrollment**. Note that your benefit elections will not be processed until you click **Submit Enrollment**.

Note: If you click Finish later, your enrollments will just be saved. You will need to return to complete your enrollment elections and submit to your HR team.

Review and Confirm

Your Cost Per Paycheck Current Cost: \$3.94 New Cost: \$76.47 + \$72.53
Benefits changes will start on 01/01/2026

Your benefit elections will not be effective until you click **Submit enrollment**.

Your Elections

Medical
ADP Services: RC - PPO Medical Updated
Effective Date: January 1, 2026
Enrolled
Kate Sanchez (You), Audrey Sanchez (Child)
New Cost: \$73.85
Cost details
+ \$73.85

Vision
ADP Services: RC Vision Plan Current
Effective Date: September 1, 2025
Enrolled
Kate Sanchez (You)
Current Cost: \$2.62
Cost details

Finish later Back Submit enrollment

There will be a pop-up confirming your submission, you must select **Yes**.

Submit enrollment

You are about to submit your enrollment. Do you want to continue?

You can make changes until August 30, 2025 11:59 PM EDT.

Yes No

Please ensure you receive the confirmation note indicating your elections have been submitted.

Enrollments

✔ **You have completed your enrollment.**
You submitted the enrollment for Open Enrollment. Contact your Human Resources department if you have questions.



2026 Open Enrollment

95 days left to make changes (11/30/2025)

✔ Submitted

✎ Make changes

If you would like to make additional changes or modifications during the Open Enrollment Period, you may log in and navigate to **Myself > Benefits > Enrollments** and click the **Make Changes** in the Open Enrollment box. This will bring you back to the beginning of the enrollment event to make any desired election changes.